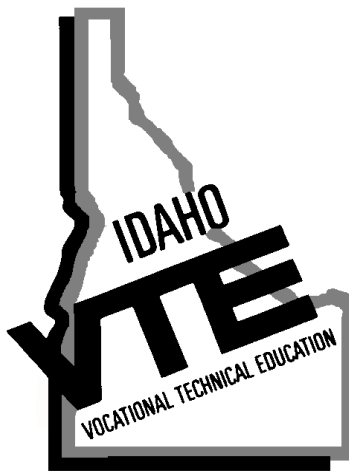


*Vo.Ed. 296*

TECHNICAL COMMITTEE REPORT  
FOR  
MEDICAL ASSISTANT:  
ADMINISTRATIVE AND CLINICAL  
TECH PREP OPTION



STATE DIVISION OF  
VOCATIONAL EDUCATION  
1994

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*Vo.Ed. 296*

*TECHNICAL COMMITTEE REPORT*

*FOR*

*MEDICAL ASSISTANT:*  
*ADMINISTRATIVE AND CLINICAL*

*TECH PREP OPTION*

*Idaho State Division of Vocational Education*  
*650 West State Street*  
*Boise, Idaho 83720*

## INTRODUCTION

This publication is a combination of the Technical Committee Report and Curriculum Guide for Medical Assistant: Administrative and Clinical. The Technical Committee Report does not dictate the level of instruction. The Task List developed represents the entire occupational field. Schools and Institutions determine what skills can be taught and what depth of instruction can be provided. They must choose the Tasks to be taught from the Technical Committee Report but are free to determine how many or which ones can be incorporated into their program. Local advisory committees are used in this step to reflect local industry training and employability trends.

The curriculum development process undertaken by the Idaho Division of Vocational Education involves the active use of industry personnel. Both education and industry personnel are included as members on Technical Committees which are responsible for the development of Task Lists for each program. The Task List prepared by the Technical Committee reflects the current trends and skills necessary for an employee to: 1) obtain a job in Idaho's industry, 2) retain a job once hired, and 3) to advance in the occupational field. Task Lists are grouped according to Duty areas generally used in industry settings. Duty areas are used as the basis for modules in the statewide Curriculum Guide development process. The Technical Committee segment is the single most significant step in the curriculum development process. All future curriculum activities are predicated on the premise that an accurate picture of industry needs is reflected in the Task List.

Industry and instructional personnel also serve on a committee to develop the Statewide Curriculum Guide. This committee writes Performance Objectives for each Task and the subsequent Enabling Objectives for each Performance Objective. The committee members prepare all material in a competency-based format so as to have an effective and efficient methodology for determining student progress. The Statewide Guides are designed as the prime determiner of program content. All programs must follow the established Guide in order to be approved for operation. Any deviation from this Guide requires written approval from the respective program supervisor at the Division of Vocational Education. It is not the intent of the Division that all programs be designed to be exactly the same, but assurance is needed to ensure that the program meets the minimum standards for operation, based on the community needs, equipment, and facilities available to the local school or institution.

The Technical Committee Report is also used as the primary list for generating Student Profiles. The Profile is used as a cumulative record of each student's progress. They are printed in a folder format and have performance scales for each Task so that student competence can be recorded for individual skills. The student profile will become the main component for Articulation activities in the event that the student desires to go on for additional training or education.

## ACKNOWLEDGMENTS

The Technical Committee process involves personnel from industry and education who are selected by the Division with assistance from the State Council on Vocational Education. People who serve on the Committees are nominated or approved by local administrators. They generally come from local advisory committees or are community and private sector representatives in a capacity to provide the necessary information about industry needs. These people serve with the approval of their employers and give their time and energies to the project without cost. The Division provides reimbursement for per diem and travel. We are indebted greatly to these industry representatives and to their employers for the resources so freely given to the pursuit of ensuring that Idaho students receive the most current training and education possible and that which is demanded by industry.

To this end, the Division recognizes the following people who served on the Technical Committee for the Medical Assistant: Administrative and Clinical: Sandy McWhorter, Diane Smith, Penny Glenn, Bonnie Lindsey, Lois Emerson, Denise Dixon, Sharie Monteferrante, and Leslie Anderson.

Your support and assistance was very greatly appreciated. Your patience for enduring the educational process is also noted. The students and instructional staff will be much more able to accomplish their respective goals as a result of your contributions.

These contributions are greatly appreciated by the Division and the administrators of programs statewide.

***This curriculum contains all of the competencies from the list provided by the accrediting body of the American Medical Association.***

Dorothy M. Witmer, Supervisor  
Health Occupations Education

Don Eshelby  
Director of Program Services

CURRICULUM FRAMEWORK

PROGRAM AREA: Health Occupations

IDAHO DIVISION OF VOCATIONAL EDUCATION EFFECTIVE DATE: October, 1994

PROGRAM TITLE: Medical Assistant: Administrative and Clinical (Postsecondary Level)

IDAHO CODE NUMBER: 2094

CIP#: 51.0801

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- I. MAJOR CONCEPTS/CONTENT: The purpose of this program is to prepare students for employment as a medical assistant. The medical assistant program is comprehensive and includes the following major competencies in the administrative and clinical roles: the role of the medical assistant in the health care industry, employability skills and habits, professionalism, communication skills, office administrative skills, records processing, filing procedures, accounting procedures, data entry operations, maintenance of health records, legal concepts, office management, inventory procedures, supervision and training of employees, math computations, decision making, principles of health and safety, preparation of treatment areas, assistance with physical examinations and treatments, collection of patient information and assessment data, collection of specimens, laboratory procedures, diagnostic tests and procedures, assistance with minor surgical procedures, assistance with medications, patient instruction and emergency procedures.
- II. DEGREE AWARDED: The medical assistant program is offered at two levels at postsecondary institutions. Upon successful completion of course requirements a student may receive a certificate or an associate degree. Clinical time is part of this program.
- III. TECH PREP OPTION: Students in high school may enroll in the Medical Assistant Tech Prep program whereby credits earned in a 2 year sequence of courses that begin at the high school are part of the Medical Assistant Program that results in an associate degree at the articulated postsecondary institution. The secondary competencies are listed separately in this Technical Committee Report.

IV. INTENDED OUTCOMES: After successfully completing this program, the student will be able to:

01. Describe components of the health care industry and the role of the medical assistant.
02. Demonstrate employability skills and habits.
03. Display professionalism.
04. Demonstrate effective communication skills.
05. Perform administrative duties.
06. Provide patient services.
07. Complete records processing.
08. Complete filing procedures.
09. Manage accounts receivable.
10. Perform accounting services.
11. Provide data entry operations.
12. Maintain health care records.
13. Apply legal concepts to practice.
14. Manage the office.
15. Maintain inventory.
16. Supervise and train employees.
17. Perform math computations both manually and electronically.
18. Perform decision making activities.
19. Apply principles of health, safety and infection control.
20. Prepare treatment areas.
21. Assist physician with physical examinations and treatments.
22. Collect patient information and assessment data.
23. Collect and prepare specimens.
24. Perform laboratory procedures (within CLIA guidelines for each state).
25. Perform diagnostic tests and procedures.
26. Assist with minor surgical procedures.
27. Assist with administration of medications.
28. Provide patient instruction.
29. Perform emergency procedures.

## *POSTSECONDARY LEVEL*



STUDENT PERFORMANCE STANDARDS

PROGRAM AREA: Health Occupations

IDAHO DIVISION OF VOCATIONAL EDUCATION

EFFECTIVE DATE: October, 1994

PROGRAM TITLE: Medical Assistant: Administrative and Clinical Competencies  
(Postsecondary)

IDAHO CODE NUMBER: 2094

CIP#: 51.0801

---

01.0 DESCRIBE COMPONENTS OF THE HEALTH CARE INDUSTRY AND THE ROLE OF THE MEDICAL ASSISTANT

- 01.01 Describe the major components of the health care industry system and contributions each component makes to the health of a community.
- 01.02 Describe the role and responsibilities of the medical assistant as part of a health care team.

02.0 DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS

- 02.01 Identify employment opportunities.
- 02.02 Apply employment seeking skills.
- 02.03 Interpret employment capabilities.
- 02.04 Demonstrate appropriate work behavior.
- 02.05 Maintain a safe and healthy environment.
- 02.06 Maintain a business-like image.
- 02.07 Adapt to change.
- 02.08 Demonstrate a knowledge of business/laws/principles.
- 02.09 Communicate effectively on the job.
- 02.10 Develop appropriate grooming habits.
- 02.11 Apply effective interpersonal/human relation skills.

03.0 DISPLAY PROFESSIONALISM

- 03.01 Project a positive attitude.
- 03.02 Perform within ethical boundaries.
- 03.03 Practice within the scope of education, training and personal capabilities.
- 03.04 Maintain confidentiality.
- 03.05 Work as a team member.
- 03.06 Conduct oneself in a courteous and diplomatic manner.
- 03.07 Show initiative and responsibility.
- 03.08 Promote the profession.

#### 04.0 DEMONSTRATE EFFECTIVE COMMUNICATION SKILLS

- 04.01 Listen and observe.
- 04.02 Apply confidentiality in all communications.
- 04.03 Apply empathy and impartiality with all customers.
- 04.04 Adapt communications according to customer needs.
- 04.05 Recognize and respond to verbal and non-verbal communications.
- 04.06 Interview effectively.
- 04.07 Serve as liaison between physician and others.
- 04.08 Receive, organize, prioritize and transmit information.
- 04.09 Follow oral and written instructions.
- 04.10 Prepare, outline and deliver short oral presentations.
- 04.11 Prepare visual material for an oral presentation.
- 04.12 Compose written communication using correct grammar, spelling and format.
- 04.13 Participate in group discussion as a member and leader.
- 04.14 Obtain appropriate information from graphics, maps or signs.
- 04.15 Locate and record information retrieved from written resources.
- 04.16 Annotate letters, reports and/or news articles.
- 04.17 Define terms associated with communications.
- 04.18 Use medical terminology and abbreviations correctly in verbalization and documentation.
- 04.19 Communicate using intercom devices.
- 04.20 Use proper telephone techniques and etiquette.
- 04.21 Transcribe dictation.
- 04.22 Process in-coming and out-going mail.
- 04.23 Operate copying machines.
- 04.24 Prepare correspondence.
- 04.25 Prepare packages for shipping.
- 04.26 Edit written materials.
- 04.27 Evaluate all forms of communication.

#### 05.0 PERFORM ADMINISTRATIVE DUTIES

- 05.01 Record/schedule office appointments.
- 05.02 Arrange conferences.
- 05.03 Make travel plans for personnel.
- 05.04 Maintain physicians' on-call schedule.
- 05.05 Schedule medical staff appointments and activities.
- 05.06 Schedule hospital and other outside agency appointments for patients.
- 05.07 Prepare and maintain medical records.
- 05.08 Apply computer concepts for office procedures.
- 05.09 Locate resources and information for patients and employers.

#### 06.0 PROVIDE PATIENT SERVICES

- 06.01 Provide processing service for patients.

- 06.02 Provide processing service for visitors.
- 06.03 Assist patient with registration forms.
- 06.04 Complete admission forms.
- 06.05 Complete discharge forms.
- 06.06 Complete insurance forms.
- 06.07 Compile patient abstracts for insurance inquiries.
- 06.08 Meet and greet patients.
- 06.09 Obtain emergency medical assistance when needed.
- 06.10 Arrange for extended patient services.
- 06.11 Refer patients to community agencies as needed.

#### 07.0 COMPLETE RECORDS PROCESSING

- 07.01 Compile daily patient census.
- 07.02 Prepare and maintain current patient data.
- 07.03 Complete legal document procedures.
- 07.04 Complete personnel insurance records.
- 07.05 Input data into automated system.
- 07.06 Complete incident reports.

#### 08.0 COMPLETE FILING PROCEDURES

- 08.01 Establish cross-reference index.
- 08.02 Maintain filing system alphabetically and numerically.
- 08.03 Maintain tickler file.
- 08.04 Retrieve filed material.
- 08.05 Maintain classified files.
- 08.06 Update health care records.
- 08.07 Maintain alphabetical, numerical, terminal digit and subject filing system.
- 08.08 Maintain manual/automated disease indexes.
- 08.09 Maintain manual/automated surgical operations indexes.
- 08.10 Maintain physical/confidential security of health care records.

#### 09.0 MANAGE ACCOUNTS RECEIVABLE

- 09.01 Collect fee for service.
- 09.02 Balance day sheet.
- 09.03 Bill patient for services.
- 09.04 Age and process past due accounts.
- 09.05 Make bank deposits.
- 09.06 Open new patient accounts.
- 09.07 Reconcile bank statements.
- 09.08 Use current third party guidelines for reimbursements.

## 10.0 PERFORM ACCOUNTING SERVICES

- 10.01 Process accounts payable invoice.
- 10.02 Make journal entries.
- 10.03 Reconcile journal.
- 10.04 Complete balance sheet.
- 10.05 Compile summary statement
- 10.06 Post entries from journals to ledgers.
- 10.07 Maintain petty cash fund.
- 10.08 Process employee payroll.
- 10.09 Input financial data in automated system.

## 11.0 PROVIDE DATA ENTRY OPERATIONS

- 11.01 Input data for agendas.
- 11.02 Transcribe minutes of meetings.
- 11.03 Input data for financial statements.
- 11.04 Input data from recorded media.
- 11.05 Input data for a letter.
- 11.06 Prepare statistical reports.
- 11.07 Input data for a medical report.
- 11.08 Maintain office equipment.
- 11.09 Compose copy to be imputed.

## 12.0 MAINTAIN HEALTH CARE RECORDS

- 12.01 Transcribe reports for medical records.
- 12.02 Code diagnoses and procedures.
- 12.03 Transfer codings from clinical records and abstracts.
- 12.04 Enter information into automated system.
- 12.05 Retrieve information from automated system.
- 12.06 Prepare medical record for microfilming.
- 12.07 Close patient records.
- 12.08 Maintain medical records.

## 13.0 APPLY LEGAL CONCEPTS TO PRACTICE

- 13.01 Document accurately.
- 13.02 Determine needs for documentation and reporting.
- 13.03 Use appropriate guidelines when releasing records or information.
- 13.04 Follow established policy in initiating or terminating medical treatment.
- 13.05 Dispose of controlled substances in compliance with government regulations.
- 13.06 Maintain licenses and accreditation.
- 13.07 Monitor legislation related to current healthcare issues and practice.

14.0 MANAGE THE OFFICE

- 14.01 Operate and maintain facilities and equipment.
- 14.02 Evaluate and recommend equipment and supplies for a practice.
- 14.03 Maintain liability coverage.
- 14.04 Exercise efficient time management.
- 14.05 Develop policy/procedures manual.
- 14.06 Schedule custodial or maintenance services.

15.0 MAINTAIN INVENTORY

- 15.01 Inventory supplies and equipment.
- 15.02 Requisition supplies and equipment.
- 15.03 Order supplies and equipment.
- 15.04 Receive supplies and equipment.
- 15.05 Store supplies and equipment.

16.0 SUPERVISE AND TRAIN EMPLOYEES

- 16.01 Orient and train employees.
- 16.02 Demonstrate use of equipment.
- 16.03 Conduct on the job training for employees.
- 16.04 Develop personnel continuing education opportunities.
- 16.05 Evaluate job performance.

17.0 PERFORM MATH COMPUTATIONS BOTH MANUALLY AND ELECTRONICALLY

- 17.01 Solve addition, subtraction, multiplication and division problems, whole numbers and fractions.
- 17.02 Solve problems involving percentages and discounts.
- 17.03 Solve problems involving comparisons.
- 17.04 Interpret charts, graphs and tables.
- 17.05 Solve finance charge and annual percentage rate problems.
- 17.06 Determine whether sufficient, insufficient, or extraneous information is given for solving a problem.
- 17.07 Solve problems involving length, width or height.
- 17.08 Solve problems using metric units.
- 17.09 Read and verify the totals on a print-out.
- 17.10 Solve problems using proportions and ratios.
- 17.11 Solve problems using systems of measurement and conversions.

18.0 PERFORM DECISION MAKING ACTIVITIES

- 18.01 List the steps in problem solving.
- 18.02 Determine the proper priority of work.
- 18.03 Prepare a day's schedule for an employer.
- 18.04 Choose appropriate actions in application of business ethics.
- 18.05 Choose appropriate actions in following a chain of command.
- 18.06 Choose appropriate actions for effective time management.
- 18.07 Select and delegate tasks; identify ways to assign work.
- 18.08 Determine preventive actions for communication problems.
- 18.09 Select the best ways to handle confidential information.
- 18.10 Use constructive feedback to correct improper behavior.
- 18.11 Identify options for solving personnel problems.
- 18.12 Choose appropriate action in solving problems involving violation of business principles.
- 18.13 Demonstrate appropriate office behavior.
- 18.14 Select items for new employee orientation.
- 18.15 Apply critical decision making/problem solving skills.

## *POSTSECONDARY CLINICAL COMPETENCIES*

## ***POSTSECONDARY CLINICAL COMPETENCIES***

### **01.0 APPLY PRINCIPLES OF HEALTH, SAFETY AND INFECTION CONTROL**

- 01.01 Perform handwashing techniques.
- 01.02 Perform sanitizing, sterilizing and disinfecting techniques.
- 01.03 Perform universal precautions.
- 01.04 Establish and maintain a sterile field.
- 01.05 Comply with current Occupational Safety and Health Administration Guidelines (OSHA).
- 01.06 Comply with Clinical Laboratory Improvement Act (CLIA).

### **02.0 PREPARE TREATMENT AREAS**

- 02.01 Prepare room for specific examinations.
- 02.02 Prepare rooms for specific treatments.
- 02.03 Assure safety of the facility and all equipment.
- 02.04 Restock supplies.

### **03.0 ASSIST PHYSICIAN WITH PHYSICAL EXAMINATIONS AND TREATMENTS**

- 03.01 Assist patient to treatment room.
- 03.02 Prepare, position and drape patients.
- 03.03 Assist physician during the examination and treatment.
- 03.04 Instruct patients according to physician's orders.
- 03.05 Assist patient in leaving the examining room.

### **04.0 COLLECT PATIENT INFORMATION AND ASSESSMENT DATA**

- 04.01 Complete patient's health history form.
- 04.02 Measure vital signs.
- 04.03 Measure heights and weights.
- 04.04 Measure growth signs of children (chest and head).
- 04.05 Record assessment data.

### **05.0 COLLECT AND PREPARE SPECIMENS**

- 05.01 Collect blood samples.
- 05.02 Collect urine specimens.
- 05.03 Collect sputum specimens.
- 05.04 Collect stool specimens.
- 05.05 Collect bacterial smears and cultures.
- 05.06 Collect specimen for PKU.
- 05.07 Prepare specimens for examination and shipment.



06.0 PERFORM LABORATORY PROCEDURES (WITHIN CLIA GUIDELINES FOR EACH STATE)

- 06.01 Operate a microscope.
- 06.02 Perform capillary blood procedure.
- 06.03 Perform skin punctures.
- 06.04 Perform blood glucose screening.
- 06.05 Perform hemoglobin and hematocrit procedures.
- 06.06 Perform Glucose Tolerance Test (GTT).
- 06.07 Perform Complete Blood Count (CBC), Differential and Platelet Count.
- 06.08 Perform venipuncture procedures for blood tests.
- 06.09 Prepare a blood smear.
- 06.10 Perform pregnancy tests.
- 06.11 Perform urine tests.
- 06.12 Prepare bacterial smears and cultures.
- 06.13 Prepare a gram stain.
- 06.14 Perform Hemocult Test.
- 06.15 Perform agglutination testing.
- 06.16 Perform sedimentation rate.

07.0 PERFORM DIAGNOSTIC TESTS AND PROCEDURES

- 07.01 Perform scratch, patch and intradermal skin tests.
- 07.02 Perform routine 12-lead ECG (EKG).
- 07.03 Perform Vision testing.

08.0 ASSIST WITH MINOR SURGICAL PROCEDURES

- 08.01 Prepare treatment room and minor surgical setup.
- 08.02 Prepare and drape surgical site.
- 08.03 Don surgical gown and gloves.
- 08.04 Assist with minor surgical procedures.
- 08.05 Remove sutures.
- 08.06 Gown and glove physician
- 08.07 Maintain sterile field.
- 08.08 Assist patient from surgical site.
- 08.09 Clean and restore surgical site.

09.0 ASSIST WITH ADMINISTRATION OF MEDICATIONS

- 09.01 Use PDR and other references.
- 09.02 Write a prescription ordered by a physician.
- 09.03 Call a prescription to a pharmacist by phone.
- 09.04 Record medications on a health care chart.

- 09.05 Instruct a patient regarding medication use.
- 09.06 Obtain and administer oral medications.
- 09.07 Administer topical medications.
- 09.08 Administer suppositories.
- 09.09 Administer inhalants.
- 09.10 Administer immunizations.
- 09.11 Administer injections.

10.0 PROVIDE PATIENT INSTRUCTION

- 10.01 Provide instruction for physical examinations and treatments.
- 10.02 Provide instruction for specimen collections.
- 10.03 Provide instruction for diagnostic tests and procedures.
- 10.04 Provide instruction for medications and their side effects.
- 10.05 Provide instruction for maintaining health and wellness and prevention of illness and accidents.
- 10.06 Provide instruction and demonstrate use of assistive devices.

11.0 PERFORM EMERGENCY PROCEDURES

- 11.01 Assemble and maintain an emergency tray of drugs and equipment.
- 11.02 Perform first aid procedures for illness and injuries.
- 11.03 Perform CPR.
- 11.04 Assist in assessment and triage of patients with emergencies.

## *SECONDARY LEVEL*

- I. MAJOR CONCEPTS/CONTENT: The purpose of this program is to begin preparation of high school students for employment as medical assistants. Program completion will be accomplished at the postsecondary institution that is articulated with the high school. The Medical Assistant Program is a Tech Prep option for students.

Major content includes: Role of the Medical Assistant in the Health Care Industry, employability skills and habits, professionalism, communication skills, limited administrative duties, limited records processing, limited filing procedures, accounting procedures, data entry operations, maintenance of health records, limited legal concepts, math computations, decision making, principles of health and safety, preparatory of treatment areas, assistance with examinations and treatments, collection of patient information and assessment data, limited collection of specimens, limited laboratory procedures, vision testing, donning and removing gloves, and emergency procedures.

- II. PRE-REQUISITES: Secondary students will complete Year I, Orientation To Health Occupations.
- III. INTENDED OUTCOMES: Upon successful completion of the competencies, the student will have basic knowledge and skill in:
01. Describe components of the health care industry and the role of the medical assistant.
  02. Demonstrate employability skills and habits.
  03. Display professionalism.
  04. Demonstrate effective communication skills.
  05. Perform administrative duties.
  06. Provide patient services.
  07. Complete records processing.
  08. Complete filing procedures.
  09. Manage accounts receivable.
  10. Perform accounting services.
  11. Provide data entry operations.
  12. Apply legal concepts to practice.
  13. Perform math computations both manually and electronically.
  14. Perform decision making activities.
  15. Apply principles of health, safety and infection control.
  16. Prepare treatment areas.

17. Assist physician with physical examinations and treatments.
18. Collect patient information and assessment data.
19. Collect and prepare specimens.
20. Perform laboratory procedures (within CLIA guidelines for each states).
21. Perform diagnostic tests and procedures.
22. Assist with minor surgical procedures.
23. Perform emergency procedures.

IV. CLINICAL ACTIVITIES: Students should have the opportunity to apply/perform competencies in health care facilities. A minimal clinical time of 40 hours is suggested; however since this is a competency-based program, time will vary for each student according to the individual's achievement of competency.

STUDENT PERFORMANCE STANDARDS

PROGRAM AREA: Health Occupations

IDAHO DIVISION OF VOCATIONAL EDUCATION

EFFECTIVE DATE: October, 1994

PROGRAM TITLE: Medical Assistant: Administrative and Clinical Competencies (Secondary)

IDAHO CODE NUMBER: 2094

CIP#: 51.0801

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01.0 DESCRIBE COMPONENTS OF THE HEALTH CARE INDUSTRY AND THE ROLE OF THE MEDICAL ASSISTANT

- 01.01 Describe the major components of health care industry system and contributions each component makes to the health of a community.
- 01.02 Describe the role and responsibilities of the medical assistant as part of a health care team.

02.0 DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS

- 02.01 Identify employment opportunities.
- 02.02 Apply employment seeking skills.
- 02.03 Interpret employment capabilities.
- 02.04 Demonstrate appropriate work behavior.
- 02.05 Maintain a safe and healthy environment.
- 02.06 Maintain a business-like image.
- 02.07 Adapt to change.
- 02.08 Demonstrate a knowledge of business/laws/principles.
- 02.09 Communicate effectively on the job.
- 02.10 Develop appropriate grooming habits.
- 02.11 Apply effective interpersonal/human relation skills.

03.0 DISPLAY PROFESSIONALISM

- 03.01 Project a positive attitude.
- 03.02 Perform within ethical boundaries.
- 03.03 Practice within the scope of education, training and personal capabilities.
- 03.04 Maintain confidentiality.
- 03.05 Work as a team member.
- 03.06 Conduct oneself in a courteous and diplomatic manner.
- 03.07 Show initiative and responsibility.
- 03.08 Promote the profession.

#### 04.0 DEMONSTRATE EFFECTIVE COMMUNICATION SKILLS

- 04.01 Listen and observe.
- 04.02 Apply confidentiality in all communications.
- 04.03 Apply empathy and impartiality with all customers.
- 04.04 Adapt communications according to customer needs.
- 04.05 Recognize and respond to verbal and non-verbal communications.
- 04.06 Receive, organize, prioritize and transmit information.
- 04.07 Follow oral and written instructions.
- 04.08 Prepare, outline and deliver short oral presentations.
- 04.09 Prepare visual material for an oral presentation.
- 04.10 Compose written communication using correct grammar, spelling and format.
- 04.11 Participate in group discussion as a member and leader.
- 04.12 Obtain appropriate information from graphics, maps or signs.
- 04.13 Locate and record information retrieved from written resources.
- 04.14 Annotate letters, reports and/or news articles.
- 04.15 Define terms associated with communications.
- 04.16 Use medical terminology and abbreviations correctly in verbalization and documentation.
- 04.17 Communicate using intercom devices.
- 04.18 Use proper telephone techniques and etiquette.
- 04.19 Transcribe dictation.
- 04.20 Process in-coming and out-going mail.
- 04.21 Operate copying machines.
- 04.22 Prepare correspondence.
- 04.23 Prepare packages for shipping.
- 04.24 Edit written materials.
- 04.25 Evaluate all forms of communication.

#### 05.0 PERFORM ADMINISTRATIVE DUTIES

- 05.01 Record/schedule office appointments.
- 05.02 Apply computer concepts for office procedures.

#### 06.0 PROVIDE PATIENT SERVICES

- 06.01 Meet and greet patients.
- 06.02 Obtain emergency medical assistance when needed.

#### 07.0 COMPLETE RECORDS PROCESSING

- 07.01 Compile daily patient census.
- 07.02 Input data into automated system.

08.0 COMPLETE FILING PROCEDURES

- 08.01 Establish cross-reference index.
- 08.02 Maintain filing system alphabetically and numerically.
- 08.03 Maintain tickler file.
- 08.04 Retrieve filed material.
- 08.05 Maintain alphabetical, numerical, terminal digit and subject filing system.

09.0 MANAGE ACCOUNTS RECEIVABLE

- 09.01 Make bank deposits.
- 09.02 Reconcile bank statements.

10.0 PERFORM ACCOUNTING SERVICES

- 10.01 Process accounts payable invoice.
- 10.02 Make journal entries.
- 10.03 Reconcile journal.
- 10.04 Complete balance sheet.
- 10.05 Compile summary statement
- 10.06 Post entries from journals to ledgers.
- 10.07 Maintain petty cash fund.
- 10.08 Process employee payroll.
- 10.09 Input financial data in automated system.

11.0 PROVIDE DATA ENTRY OPERATIONS

- 11.01 Input data for agendas.
- 11.02 Transcribe minutes of meetings.
- 11.03 Input data for financial statements.
- 11.04 Input data from recorded media.
- 11.05 Input data for a letter.
- 11.06 Input data for a medical report.
- 11.07 Maintain office equipment.
- 11.08 Compose copy to be inputted.

12.0 APPLY LEGAL CONCEPTS TO PRACTICE

- 12.01 Document accurately.
- 12.02 Monitor legislation related to current healthcare issues and practice.



13.0 PERFORM MATH COMPUTATIONS BOTH MANUALLY AND ELECTRONICALLY

- 13.01 Solve addition, subtraction, multiplication and division problems, whole numbers and fractions.
- 13.02 Solve problems involving percentages and discounts.
- 13.03 Solve problems involving comparisons.
- 13.04 Interpret charts, graphs and tables.
- 13.05 Solve finance charge and annual percentage rate problems.
- 13.06 Determine whether sufficient, insufficient, or extraneous information is given for solving a problem.
- 13.07 Solve problems involving length, width or height.
- 13.08 Solve problems using metric units.
- 13.09 Read and verify the totals on a print-out.
- 13.10 Solve problems using proportions and ratios.
- 13.11 Solve problems using systems of measurement and conversions.

14.0 PERFORM DECISION MAKING ACTIVITIES

- 14.01 List the steps in problem solving.
- 14.02 Determine the proper priority of work.
- 14.03 Prepare a day's schedule for an employer.
- 14.04 Choose appropriate actions in application of business ethics.
- 14.05 Choose appropriate actions in following a chain of command.
- 14.06 Choose appropriate actions for effective time management.
- 14.07 Select and delegate tasks; identify ways to assign work.
- 14.08 Determine preventive actions for communication problems.
- 14.09 Select the best ways to handle confidential information.
- 14.10 Use constructive feedback to correct improper behavior.
- 14.11 Identify options for solving personnel problems.
- 14.12 Choose appropriate action in solving problems involving violation of business principles.
- 14.13 Demonstrate appropriate office behavior.
- 14.14 Select items for new employee orientation.
- 14.15 Apply critical decision making/problem solving skills.

## *SECONDARY CLINICAL COMPETENCIES*

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### **01.0 APPLY PRINCIPLES OF HEALTH, SAFETY AND INFECTION CONTROL**

- 01.01 Perform handwashing techniques.
- 01.02 Perform sanitizing, sterilizing and disinfecting techniques.
- 01.03 Perform universal precautions.
- 01.04 Establish and maintain a sterile field.
- 01.05 Comply with current Occupational Safety and Health Administration Guidelines (OSHA).
- 01.06 Comply with Clinical Laboratory Improvement Act (CLIA).

### **02.0 PREPARE TREATMENT AREAS**

- 02.01 Prepare room for specific examinations.
- 02.02 Prepare rooms for specific treatments.
- 02.03 Assure safety of the facility and all equipment.
- 02.04 Restock supplies.

### **03.0 ASSIST PHYSICIAN WITH PHYSICAL EXAMINATIONS AND TREATMENTS**

- 03.01 Assist patient to treatment room.
- 03.02 Prepare, position and drape patients.
- 03.03 Assist patient in leaving the examining room.

### **04.0 COLLECT PATIENT INFORMATION AND ASSESSMENT DATA**

- 04.01 Complete patient's health history form.
- 04.02 Measure vital signs.
- 04.03 Measure heights and weights.
- 04.04 Measure growth signs of children (chest and head).
- 04.05 Record assessment data.

### **05.0 COLLECT AND PREPARE SPECIMENS**

- 05.01 Collect urine specimens.
- 05.02 Collect sputum specimens.
- 05.03 Collect stool specimens.

06.0 PERFORM LABORATORY PROCEDURES (WITHIN CLIA GUIDELINES FOR EACH STATE)

06.01 Operate a microscope.

06.02 Perform urine tests.

07.0 PERFORM DIAGNOSTIC TESTS AND PROCEDURES

07.01 Perform Vision testing.

08.0 ASSIST WITH MINOR SURGICAL PROCEDURES

08.01 Don surgical gown and gloves.

09.0 PERFORM EMERGENCY PROCEDURES

09.01 Perform first aid procedures for illness and injuries.

09.02 Perform CPR.